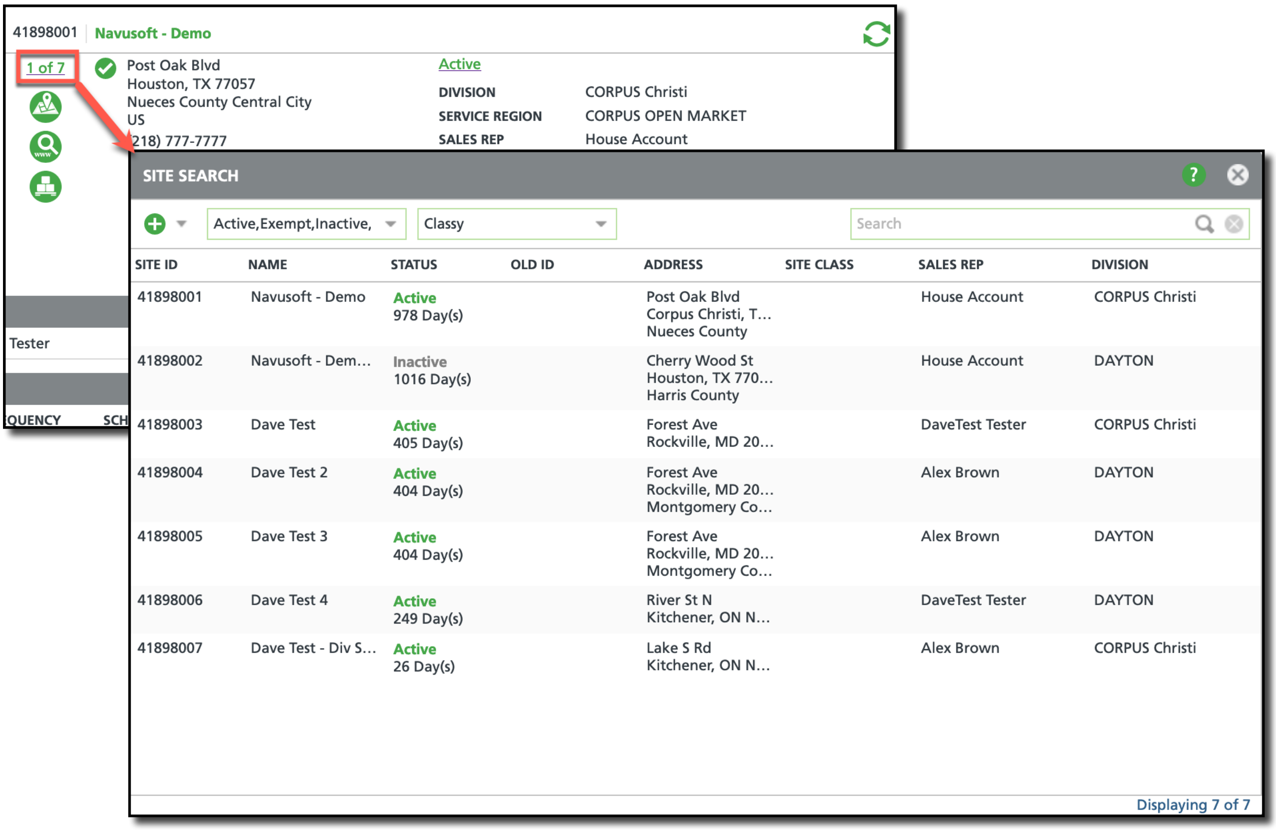
# Navigate Between Sites & Add a New Site

Last Modified on 02/22/2024 4:39 pm EST

**Pathway:** *Accounts > Search > Account Details Screen*

From the Customer's screen, users can quickly navigate between the different site locations under the parent account and add a new site.



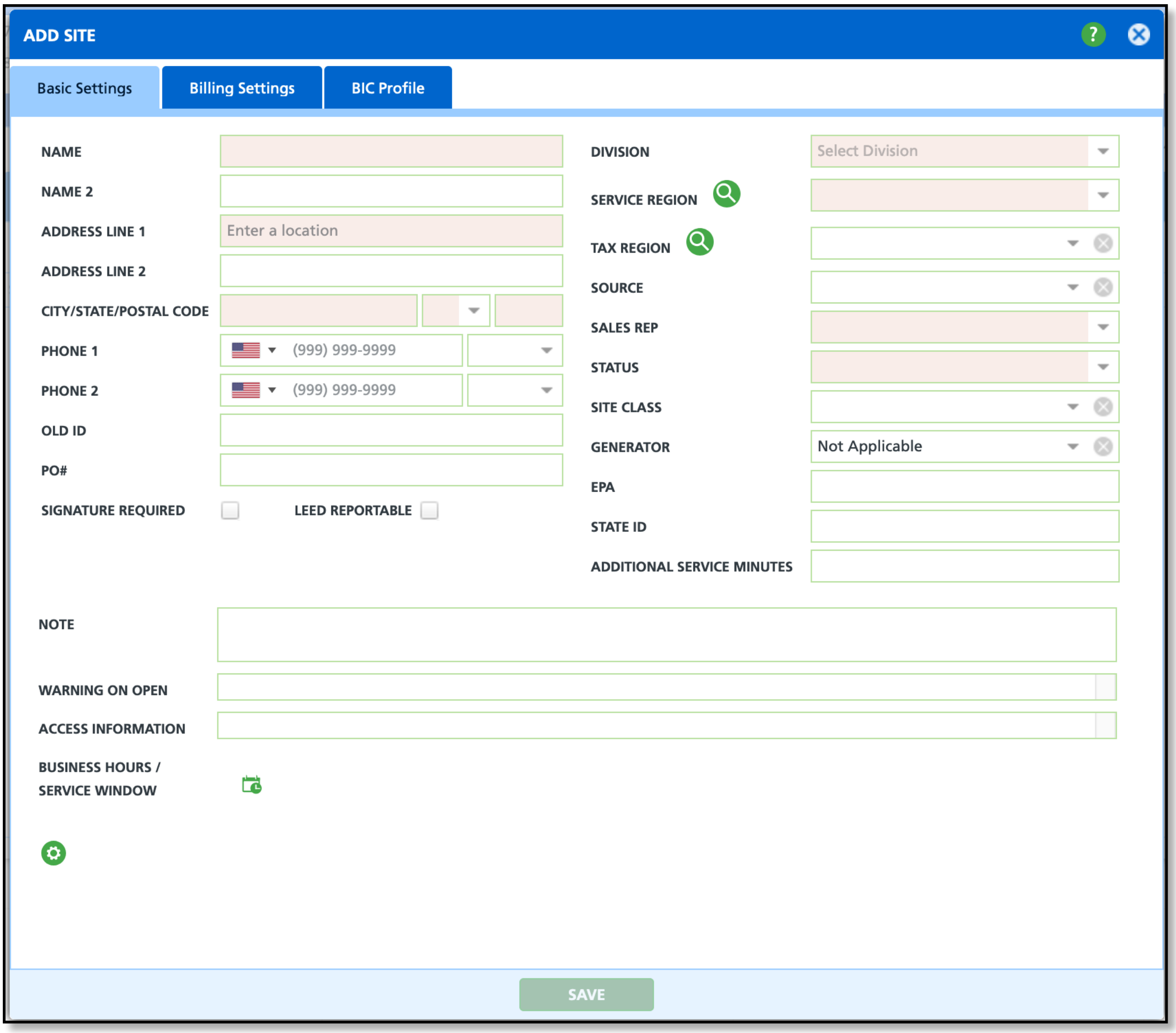

## View All Sites

1. Select **# of #** (example: 1 of 2) to display the Site Search popup window.
    - TIP: Use the filtering options at the top of the Site Search screen to limit what types of site's display (Ex: only display sites where Status is Active).
2. Double-click within the row of the desired site. The site will open in current window's tab.

## Add a New Site

1. Select **# of #** (example: 1 of 2) from the Customer's screen to display the Site Search popup window.
2. Select the green **'+' icon** from the upper right corner in Site Search and select *Sit.* A new 'Add Site' popup window will display.
3. Complete all required fields highlighted red in the *Basic Settings* tab and click **Save.** Additional fields should be completed based on your company's data entry procedures.
4. Select the *Billing Settings* tab and minimally complete all fields highlighted red and click **Save.** Additional fields should be completed based on your company's data entry procedures.

# Add A Site Tab Descriptions




# Field Descriptions - Basic Settings

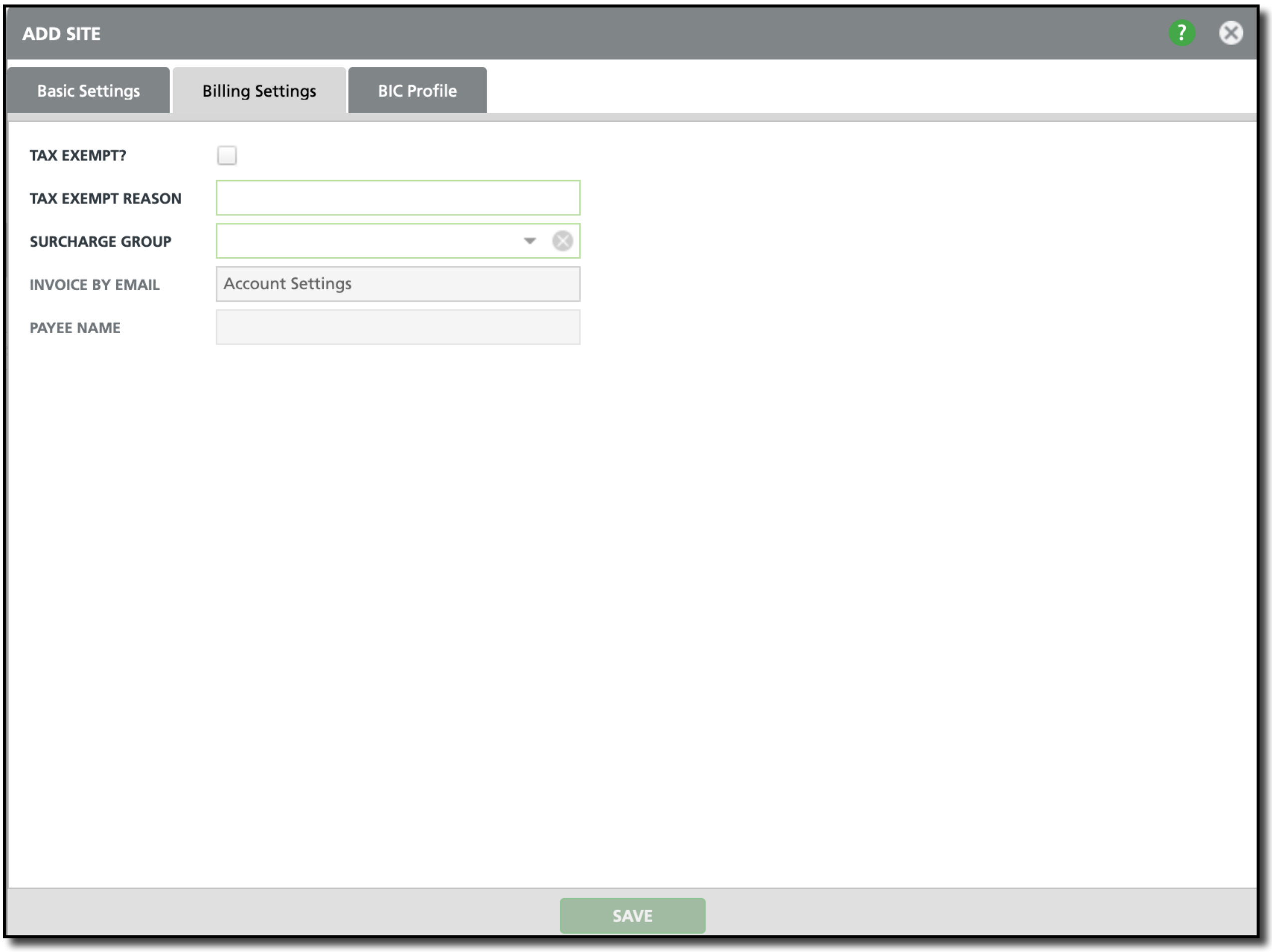
The Basic Settings tab includes vital site details like address, site name, notes, and other essential information for accounting and operational purposes.

| Field | Description |
|---|---|
| Contact/Location Information (Name, Address, Phone) | Enter the contact and location information for the site. |
| Signature Required | If selected, the driver will be required to collect a signature each time they service the location. |
| LEED Reportable | If selected, data will be collected for environmental reporting. |
| Division | The region the account belongs to. The division the site is assigned determines who handles the site in other areas such as dispatch and operations and helps billing processing. |

| Field | Description |
| --- | --- |
| Service Region | Identifies the region the site belongs to. |
| Tax Region | Identifies the tax region the site belongs to. |
| Source | Indicates how the site originated and helps with future sales and marketing campaigns. |
| Sales Rep | The sales representative that manages the site. |
| Status | Indicates the current status of the site. |
| Site Class | The Site Class the site is included in. |
| Generator | The amount of waste expected to be generated by this site. |
| EPA | The EPA ID for the site. |
| State ID | The State ID for the site. |
| Additional Service Minutes | Expected additional service minutes needed to complete services for this site. |
| Note | Displays in the site details section when viewing the Customer screen. |
| Warning on Open | Displays as a site-specific pop-up warning anytime the site is accessed. |
| Access Information | Used for conveying information the driver will need to access a location. Displays every time the location is serviced. |
| Business Hours / Service Window | Used to identify a site's hours of operation. Select the calendar icon to add a schedule. |

## Field Descriptions: Billing Settings

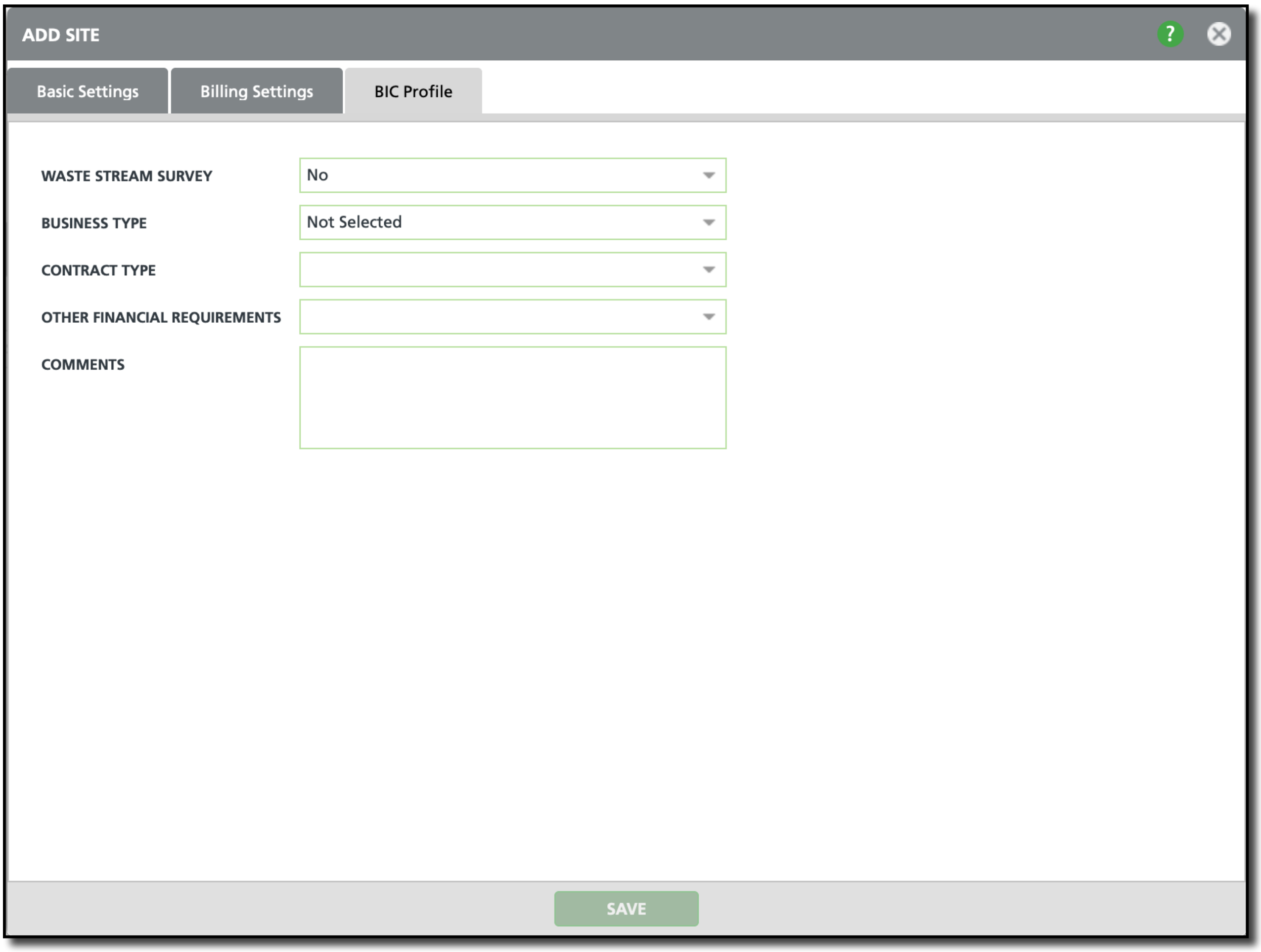
The Billing Settings tab establishes the billing requirements for the site, including the receipt method for invoices and the designated billing contact.




| Field | Description |
|---|---|
| **Tax Exempt** | If the site **is** tax exempt and no tax region was selected when the account was created, select the **Tax Exempt** check box. |
| **Tax Exempt Reason** | If the Tax Exempt box is checked, enter supporting information for the reason why the site is exempt. |
| **Surcharge Group** | Select a Surcharge Group if the site is subject to a surcharge. |
| **Invoice Detail Level** | Determines the amount of information the invoice should include. |
| **Invoice By Email** | If the site is receiving invoices by email, select:<br>• **Account Settings** and the site will follow the parent account's settings.<br>• **Email With Link** and the site will receive a URL link to open the invoice.<br>• **Email With PDF Attachment** and the invoice will be attached to the email as a PDF. |
| **Payee Name** | Select the name of the site's billing contact if the contact is different than the account contact. Contacts are only assigned here. To create a contact, the Contacts tool must be used. |

## BIC Profile

The BIC Profile tab pertains to commercial establishments in New York mandated by law to arrange for the collection of their putrescible waste and recyclables through a hauler licensed by the Business Integrity Commission (BIC).




| Field | Description |
| --- | --- |
| **Waste Stream Survey** | Indicates if a waste stream survey was completed for the site. |
| **Business Type** | Specifies the business categorization used to identify the type of waste generated by the site. |
| **Contract Type** | Indicates if the contract between the customer and hauler was written or oral. |
| **Other Financial Requirements** | Indicates  if the site has other financial requirements. |
| **Comments** | Option to provide addition comments regarding the site's BIC profile. |